

Sub 10
We claim:

1. A computer-implemented method for creating a portfolio of issues comprising the steps of:
 - specifying issues to be added to the portfolio;
 - selecting one of a plurality of options for creating the portfolio;
 - creating the portfolio based on said selection of one of said plurality of options.
2. The computer-implemented method according to claim 1, wherein said selecting step includes selecting an option to allocate a number of shares for each issue.
3. The computer-implemented method according to claim 2, wherein the number of shares is constant for each issue.
4. The computer-implemented method according to claim 2, wherein the number of shares is not constant for each issue.
5. The computer-implemented method according to claim 2, wherein the number of shares for each issue is based on a weighting factor.
6. The computer-implemented method according to claim 1, wherein said selecting step includes selecting an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is selectable by a user.
7. The computer-implemented method according to claim 1, wherein said selecting step includes selecting an option to allocate a total amount for the portfolio.
8. The computer-implemented method according to claim 7, wherein said amount is equally divided between said issues.

1 9. The computer-implemented method according to claim 7, wherein said amount is
2 not equally divided between said issues.

1 10. The computer-implemented method according to claim 7, wherein said amount is
2 divided between said issues based on a weighting factor.

1 11. The computer-implemented method according to claim 1, further comprising the
2 step of selecting a date for the purchase of the portfolio.

1 12. A user-interface for specifying a portfolio of issues comprising:
2 a first display portion displaying issues input by a user;
3 a second display portion displaying choices of how to add said issues into said portfolio.

1 13. The user interface according to claim 12, wherein said second display portion
2 includes as one of said choices specifying a number of shares of said issues.

1 14. The user interface according to claim 12, wherein said second display portion
2 includes as one of said choices an amount to be used to acquire each of said assets.

1 15. The user interface according to claim 12, wherein said second display portion
2 includes as one of said choices an amount to be used to acquire all of said assets.

1 16. The user interface according to claim 12, further comprising a third display
2 portion receiving a user-specified date upon which the price of each issue is determined.

1 17. A computer-readable medium having a program for creating a portfolio of issues,
2 said program comprising the steps of:

3 specifying issues to be added to the portfolio;
4 selecting one of a plurality of options for creating the portfolio;
5 creating the portfolio based on said selection of one of said plurality of options.

1 18. The computer-readable medium having said program according to claim 17,
2 wherein said selecting step includes selecting an option to allocate a number of shares for each
3 issue.

1 19. The computer-readable medium having said program according to claim 18,
2 wherein the number of shares is constant for each issue.

1 20. The computer-readable medium having said program according to claim 18,
2 wherein the number of shares is not constant for each issue.

1 21. The computer-readable medium having said program according to claim 18,
2 wherein the number of shares for each issue is based on a weighting factor.

22. The computer-readable medium having said program according to claim 17,
wherein said selecting step includes selecting an option to allocate an equal amount for the
purchase of each issue and wherein said equal amount is selectable by a user.

23. The computer-implemented method according to claim 1, wherein said selecting
step includes selecting an option to allocate a total amount for the portfolio.

24. The computer-implemented method according to claim 23, wherein said amount
is equally divided between said issues.

1 25. The computer-implemented method according to claim 23, wherein said amount
2 is not equally divided between said issues.

1 26. The computer-implemented method according to claim 23, wherein said amount
2 is divided between said issues based on a weighting factor.

1 27. The computer-implemented method according to claim 17, further comprising the
2 step of selecting a date for the purchase of the portfolio.

1 28. A system for creating a portfolio of issues comprising:

2 a user input for receiving a designation of issues and for receiving a designation of an
3 option of creating said portfolio selected from a plurality of options;
4 an input for receiving a price associated with each of said issues;
5 a processor for determining the number of shares of said issues to add to said portfolio
6 based on said designated option.

1 29. The system according to claim 28, wherein said processor determines the number
2 of shares of said issues to add to said portfolio based on said designated option and said price.

1 30. A computer-readable medium having a program for creating a portfolio of issues,
2 said program comprising the steps of:

3 specifying issues to be added to the portfolio
4 specifying a closing date for the issues;
5 receiving prices for the specified issues based on the specified closing date;
6 selecting a quantity of said specified issues;
7 creating the portfolio based on the specified issues and the selected quantity of the
8 specified issues; and
9 storing said portfolio.

1 31. The computer readable medium according to claim 30, wherein said storing step
2 stores said portfolio on a client computer.

1 32. The computer readable medium according to claim 30, wherein said storing step
2 stores said portfolio on a server computer.

1 33. The computer readable medium according to claim 30, wherein said program
2 further comprising the step of:

3 receiving other information regarding the specified issues.

1 34. A computer-implemented method for creating a portfolio of issues comprising the
2 steps of:

3 specifying issues to be added to the portfolio

4 specifying a closing date for the issues;

5 receiving prices for the specified issues based on the specified closing date;

6 selecting a quantity of said specified issues;

7 creating the portfolio based on the specified issues and the selected quantity of the
8 specified issues; and

9 storing said portfolio.

10 35. The computer implemented method according to claim 34, wherein said storing
11 step stores said portfolio on a client computer.

12 36. The computer implemented method according to claim 34, wherein said storing
13 step stores said portfolio on a server computer.

14 37. The computer implemented method according to claim 34 further comprising the
15 step of:

16 receiving other information regarding the specified issues.